

Auto Dealer Services Division's System Replacement

Dealer PIN Letters: Establishing
Online Accounts and Linking
Users



Agenda



- 01 Overview
- 02 Dealer PIN letter
- 03 Access Indiana
- 04 Find My Dealer Licenses
- 05 Role Assignment



Introductions – Secretary of State and PCC Technology Group

ADSD Staff Assisting with the Webinar:

- Jenifer Nelson, Project Manager
- Melissa Reynolds, Director

Overview

The System Replacement Project will be completed in 2 phases:

- Phase 1: Replace the legacy in-house Dealer Licensing System (DLS), provide online Dealer account setup and provide a new Plates on Demand system
 - The Dealer PIN letters allow for the account setup for Phase 1 online activities
- Phase 2: Provide complete online functionality

Dealer PIN Letters

- Mailing occurred over several days
- Dealers with more than one license will receive more than one letter
- Those recently approved may not have received a letter yet



CONNIE LAWSON
SECRETARY OF STATE

STATE OF INDIANA AUTO DEALER SERVICES DIVISION

MELISSA REYNOLDS
Division Director

DealerFN DealerLN
DealerName

AddressLine1 Address Line2
City, State Zip5-Zip4

9-Mar-2017

RE: Dealer Number DealerNumber Online Account Set-up

Dear DealerFN DealerLN:

As you may know, the Indiana Secretary of State Auto Dealer Services Division ("Division") has been working on a brand new dealer licensing system. As part of the first phase of implementing the new system, we will be introducing a new Plates on Demand system in the coming weeks. In order to access the new Plates on Demand, you must set up your online dealer account.

You may begin setting up your online dealer account on **March 10, 2017**. **We strongly encourage you to set up your account as soon as possible, and no later than March 31, 2017**, so that you may begin requesting and generating interim license plates as soon as the new system is live. Please watch for more information related to the system going live.

Below you will find your PIN that must be used in conjunction with your name and Dealer License Number (provided above) to establish your relationship to your online dealer account.

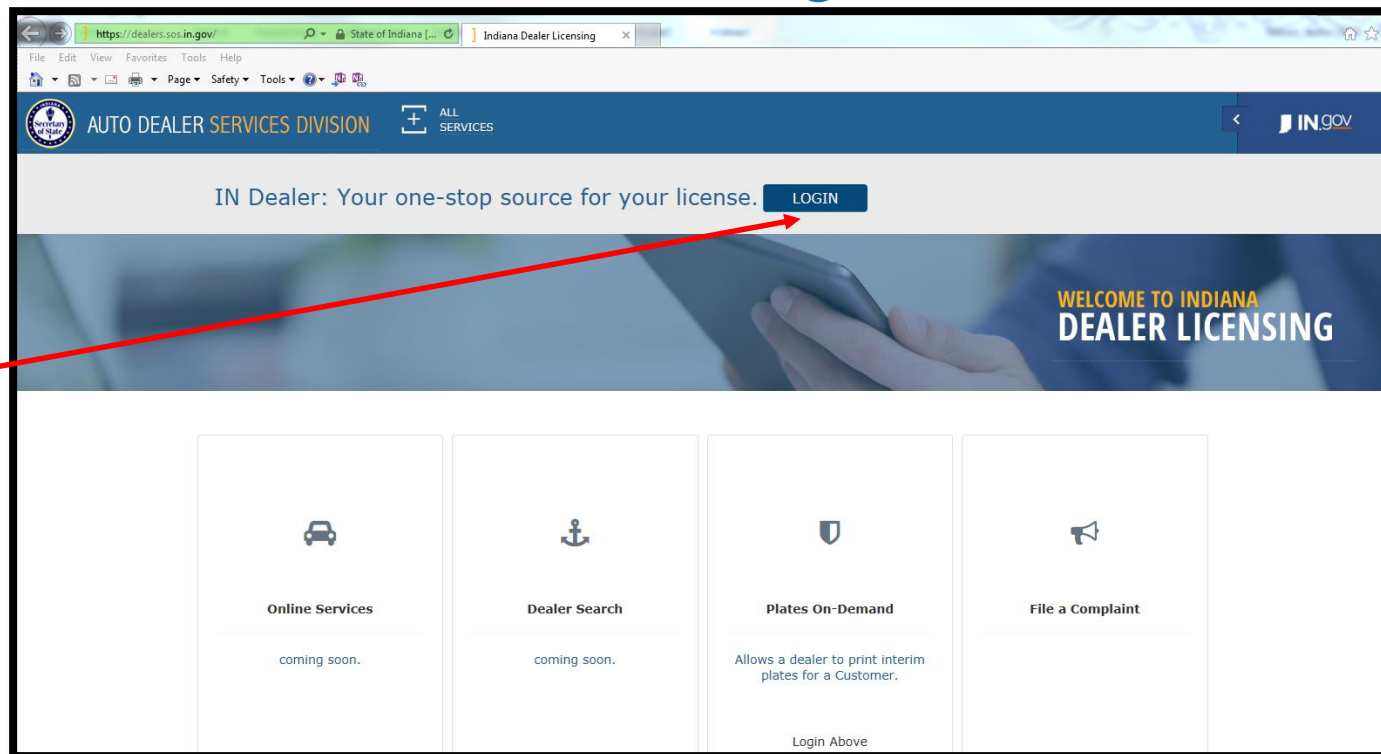
PIN: DealerPIN

To access your online dealer account, please visit <https://dealers.sos.in.gov>. Click on "Login." Enter the email

Online Dealer Portal

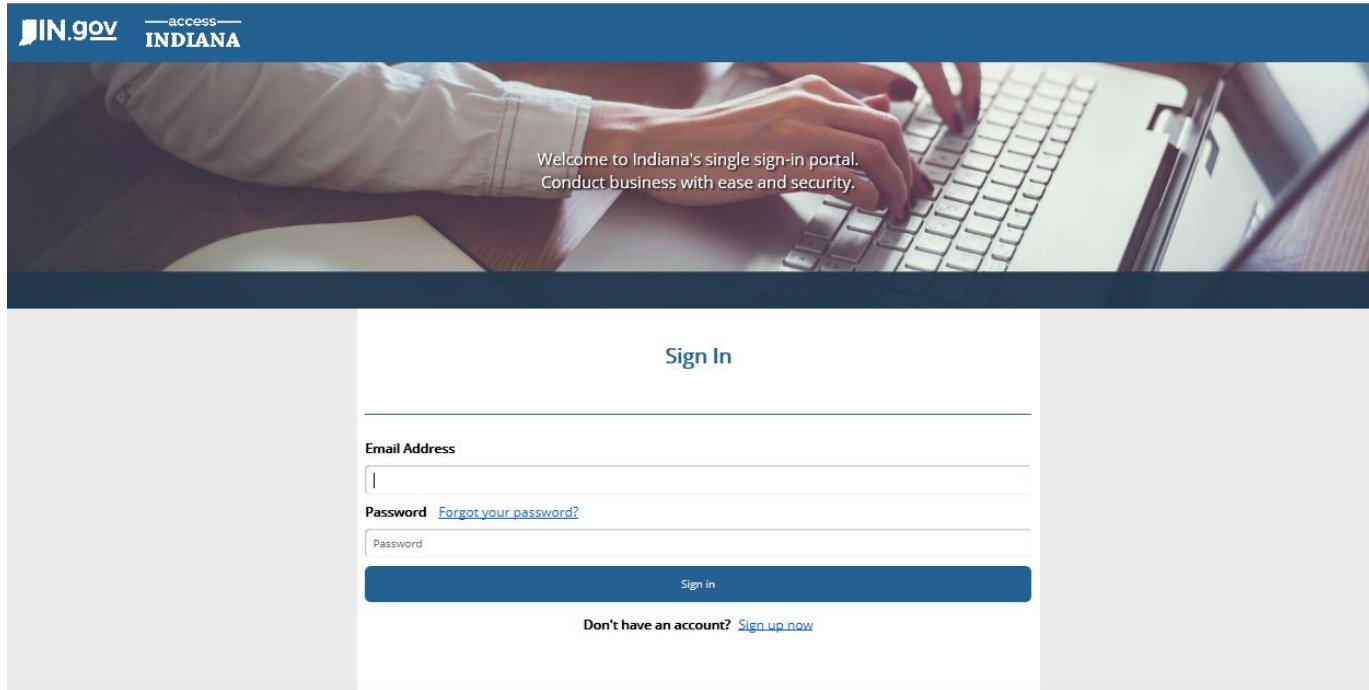
Users can access the Online Dealer Portal by clicking the link in the Dealer PIN letter: <https://dealers.sos.in.gov/>

Select Login



Online Dealer Portal: Getting Started

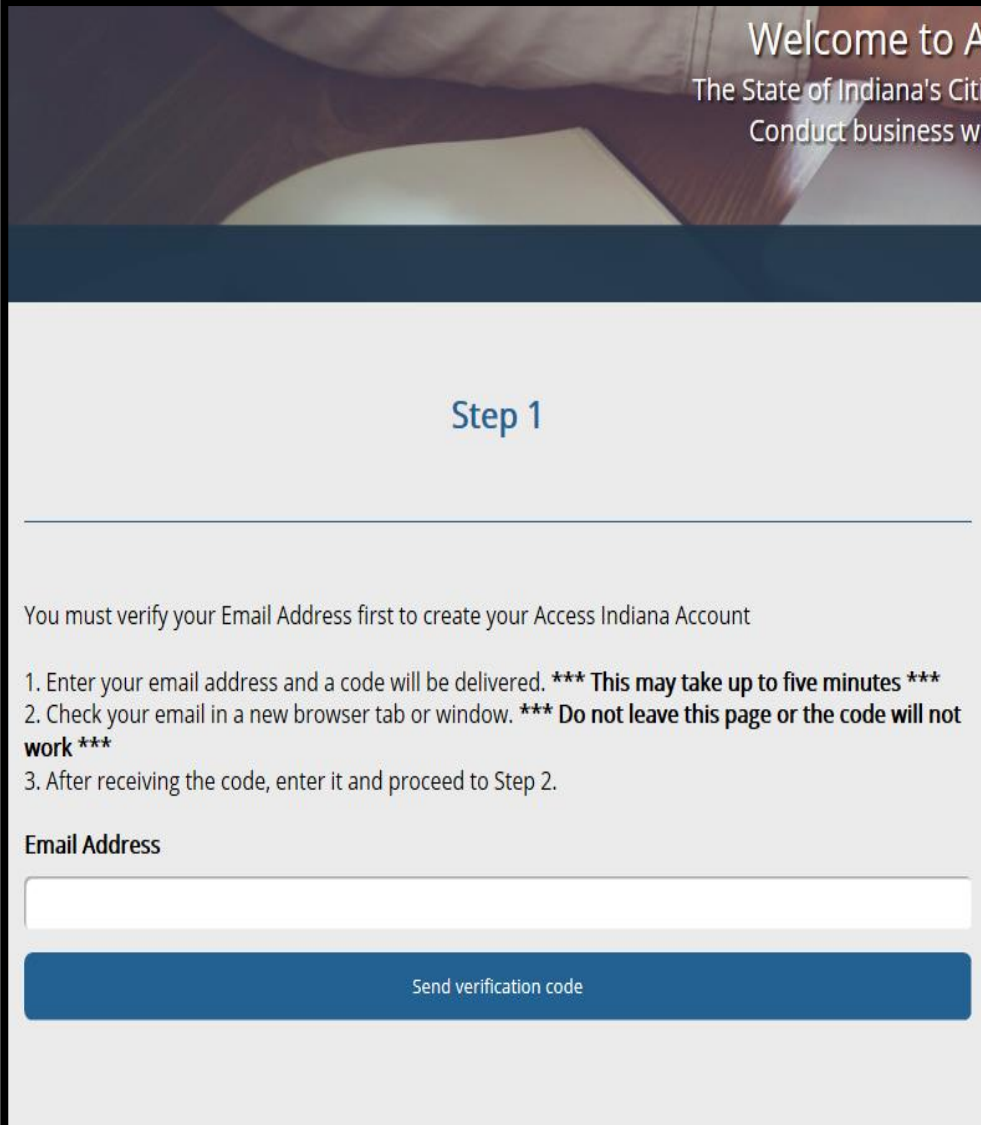
The Primary Owner must complete the initial Dealer Registration and Login process through the Access Indiana Single Sign-On Portal.

The screenshot shows the 'Sign In' page of the Access Indiana Single Sign-On Portal. At the top, there is a dark blue header with the 'IN.gov' logo and the text 'access INDIANA'. Below the header is a banner image of hands typing on a laptop keyboard, with the text 'Welcome to Indiana's single sign-in portal. Conduct business with ease and security.' overlaid. The main content area is white and contains a 'Sign In' section. This section has two input fields: 'Email Address' and 'Password'. The 'Password' field has a link for 'Forgot your password?'. Below the input fields is a dark blue 'Sign in' button. At the bottom of the section, there is a link for 'Don't have an account? Sign up now'.

1. If user has already established credentials for INBiz, the same username and password can be used for the Online Dealer Portal.
2. If not, select “Sign up now”.

After Selecting “Sign Up Now” - Step One

- Decide which email address you will use to register
- Sign in to your email service, as you will need to reference the verification code email
- Enter your email address and select “send verification code”
- Access your email service for the email containing the verification code
- Enter the verification code
- Go to Step 2



Welcome to A
The State of Indiana's Citi
Conduct business w

Step 1

You must verify your Email Address first to create your Access Indiana Account


1. Enter your email address and a code will be delivered. ***** This may take up to five minutes *****
2. Check your email in a new browser tab or window. ***** Do not leave this page or the code will not work *****
3. After receiving the code, enter it and proceed to Step 2.

Email Address

Send verification code

After Selecting “Sign Up Now” - Step 2

- Choose a secure password using the criteria provided
 - 8-16 characters
 - As well as 3 out of 4 of the following:
 - lowercase characters
 - UPPERCASE CHARACTERS
 - Digits (0 to 9)
 - Symbols @ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ " () ;
- Enter remaining information



The screenshot shows a web form titled "Step 2" with a horizontal line below the title. The form contains several input fields with labels to their left:

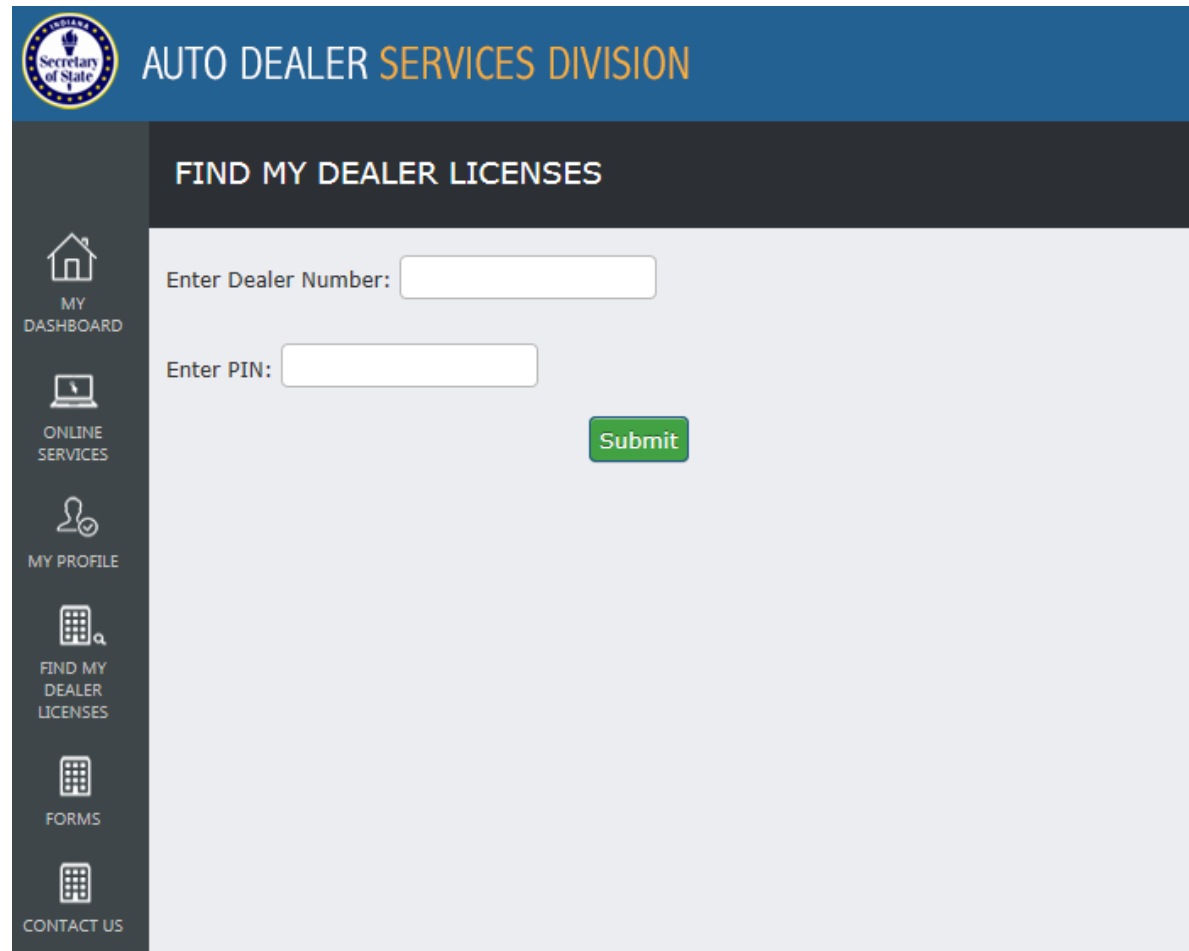
- Create New Password**: A label above a text input field. Below the field is a small text note: "8-16 characters, containing 3 out of 4 of the following: Lowercase characters, uppercase characters, digits (0-9), and one or more of the following symbols: @ # \$ % ^ & * _ + = [] { } | \ : ' , ? / ` ~ \" () ; . This information is required."
- Confirm New Password**: A label above a text input field.
- First Name**: A label above a text input field.
- Middle Initial**: A label above a text input field.
- Last Name**: A label above a text input field.
- Phone Number**: A label above a text input field.

“Sign Up Now” - Troubleshooting

- If you should request another verification code, you should enter a new password as well
- If you are registered with the Access Indiana single sign-on but are locked out due to too many password attempts, contact Dealer Services at **317-234-7190**

Online Dealer Portal: My Dashboard

Once authenticated, you will be redirected to the Online Dealer Dashboard.



The screenshot displays the 'Online Dealer Portal: My Dashboard' interface. At the top, a dark blue header features the 'INDIAN Secretary of State' logo on the left and the text 'AUTO DEALER SERVICES DIVISION' in white and orange. Below the header, a dark grey sidebar on the left contains six menu items with corresponding icons: 'MY DASHBOARD' (house icon), 'ONLINE SERVICES' (laptop icon), 'MY PROFILE' (person icon), 'FIND MY DEALER LICENSES' (calculator icon), 'FORMS' (calendar icon), and 'CONTACT US' (phone icon). The main content area has a dark grey top bar with the text 'FIND MY DEALER LICENSES'. Below this, the form includes two input fields: 'Enter Dealer Number:' and 'Enter PIN:'. A green 'Submit' button is positioned to the right of the 'Enter PIN:' field.

INDIAN Secretary of State AUTO DEALER SERVICES DIVISION

FIND MY DEALER LICENSES

Enter Dealer Number:

Enter PIN:

Submit

MY DASHBOARD

ONLINE SERVICES

MY PROFILE

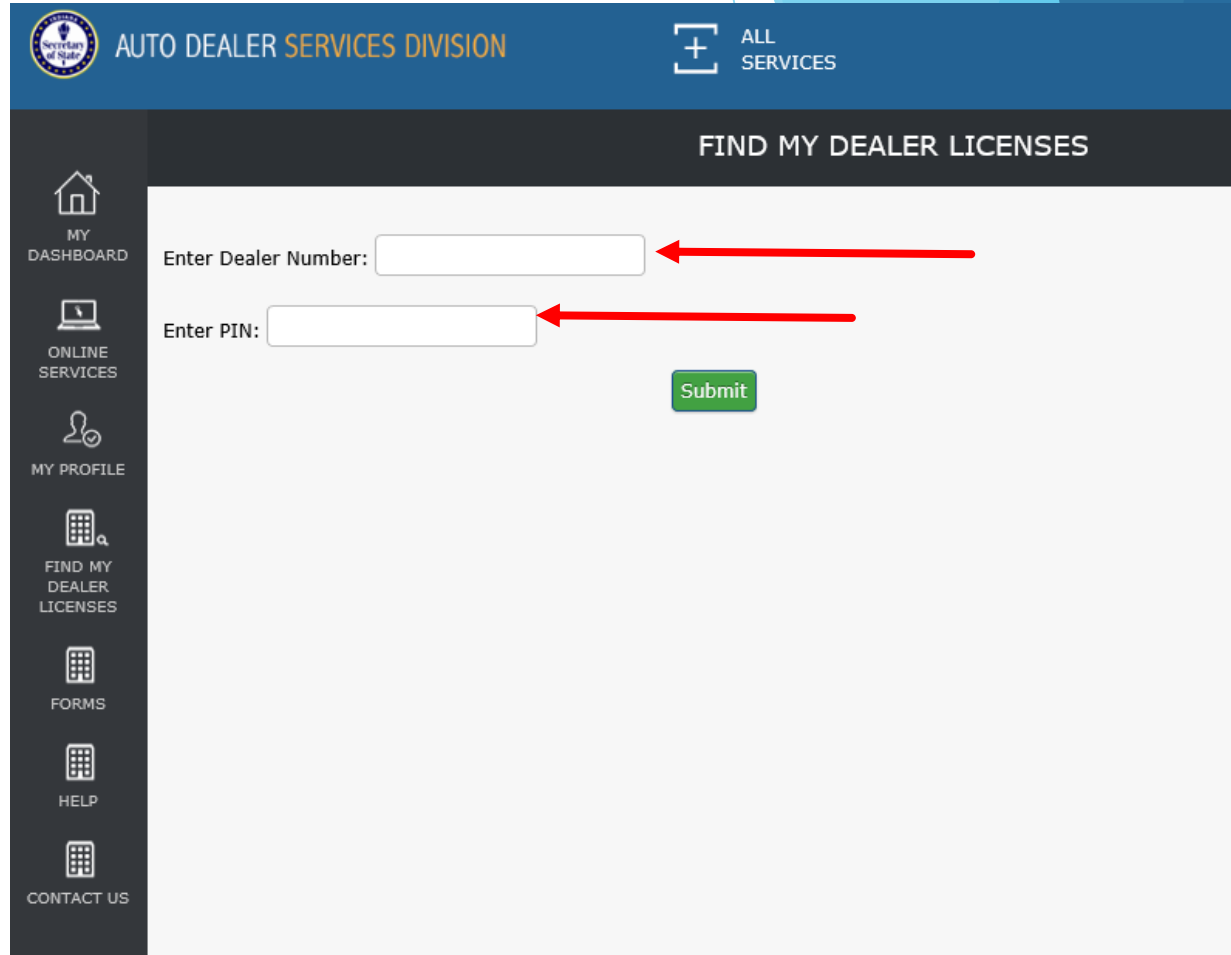
FIND MY DEALER LICENSES

FORMS

CONTACT US

Find My Dealer Licenses

- The Primary Owner will be assigned a PIN, which they must use to link themselves to their License(s).
- Reference your Dealer PIN letter for this randomly-generated alphanumeric code.
- Note: for those Dealers with license numbers beginning with 4 to 9, please add the leading zero. (Ex: 0412345)
- Select “Submit”



The screenshot shows the 'FIND MY DEALER LICENSES' page from the 'AUTO DEALER SERVICES DIVISION'. The page has a dark blue header with the division name and a logo. A sidebar on the left contains icons and labels for 'MY DASHBOARD', 'ONLINE SERVICES', 'MY PROFILE', 'FIND MY DEALER LICENSES' (which is highlighted), 'FORMS', 'HELP', and 'CONTACT US'. The main content area has a title 'FIND MY DEALER LICENSES' and two input fields: 'Enter Dealer Number:' and 'Enter PIN:'. Red arrows point to these fields. A green 'Submit' button is located below the input fields.

AUTO DEALER SERVICES DIVISION

ALL SERVICES

FIND MY DEALER LICENSES

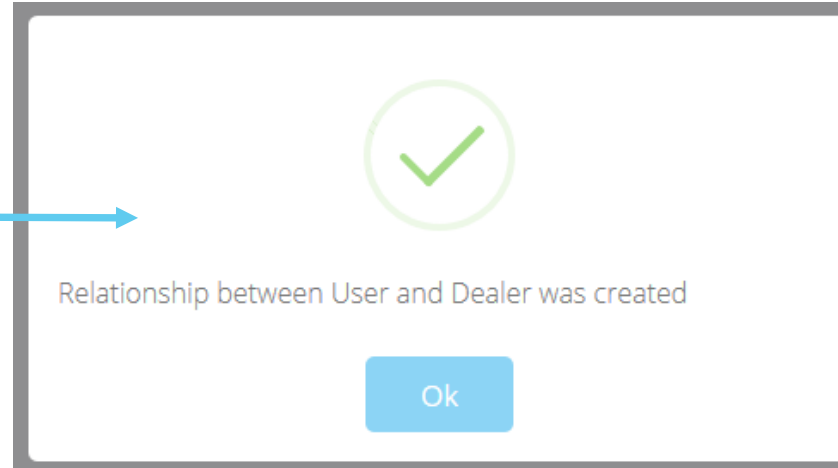
Enter Dealer Number:

Enter PIN:

Submit

Find My Dealer Licenses: Successful

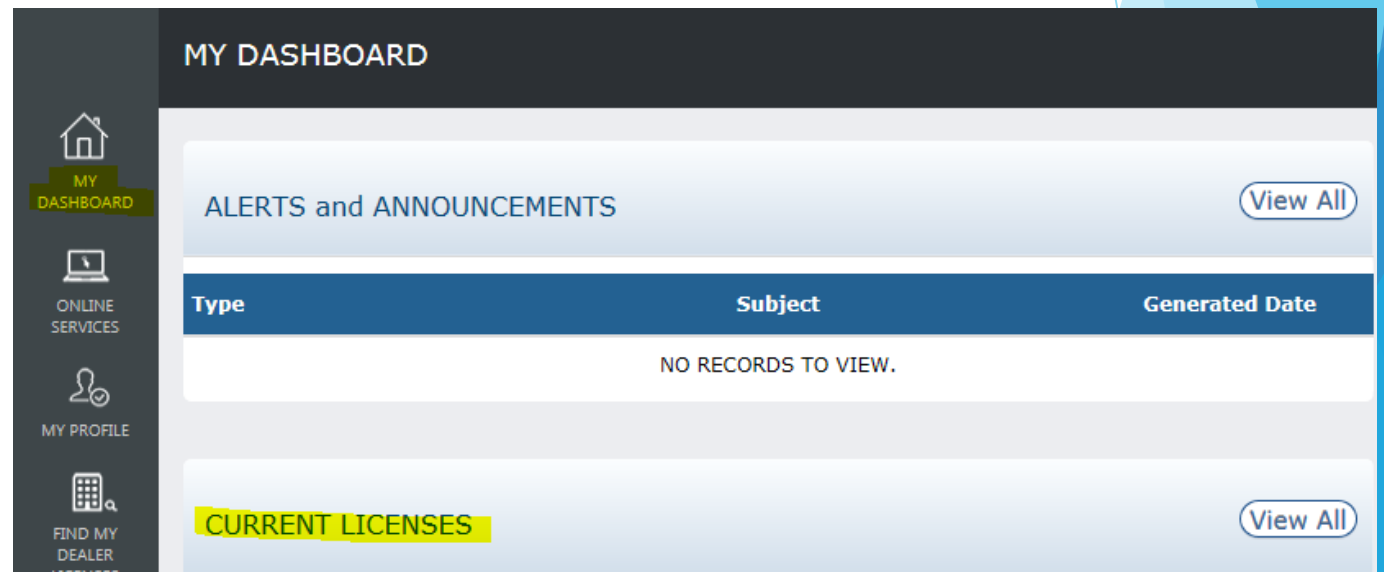
You will receive this message when successfully linked.



Repeat this process for each Dealer Number

To Verify:

- Select "My Dashboard"
- Look at "Current Licenses". Your Dealer(s) will be listed

A screenshot of a web application's "MY DASHBOARD" page. On the left is a dark gray sidebar with four icons and labels: a house icon for "MY DASHBOARD" (highlighted in yellow), a laptop icon for "ONLINE SERVICES", a person icon for "MY PROFILE", and a magnifying glass over a calendar icon for "FIND MY DEALER LICENSES". The main content area has a dark header with "MY DASHBOARD" in white. Below the header, there are two sections. The first section is titled "ALERTS and ANNOUNCEMENTS" with a "View All" button on the right. It contains a table with three columns: "Type", "Subject", and "Generated Date". The table body shows "NO RECORDS TO VIEW.". The second section is titled "CURRENT LICENSES" (highlighted in yellow) with a "View All" button on the right. The table body is currently empty.

Online Dealer Portal: Additional Users

Additional employees can also link to one or more Dealer Licenses by going through the same process, no PIN is required.

The image is a collage of screenshots from the Indiana Dealer Licensing portal, illustrating the process of creating a new user. The main screenshot shows the 'Sign In' page with fields for 'Email Address' and 'Password', and a 'Sign in' button. Below the button is a link for 'Don't have an account? Sign up now'. Overlaid on this are several other screenshots: 'Step 1' shows a message: 'You must verify your Email Address first to create your Access Indiana Account. 1. Enter your email address and a code will be delivered. *** This may take work *** 2. Check your email in a new browser tab or window. *** Do not leave this work *** 3. After receiving the code, enter it and proceed to Step 2.' Below this is a 'Send verification code' button. 'Step 2' shows the 'Create New Password' form with fields for 'New Password', 'Confirm New Password', 'First Name', 'Middle Initial', 'Last Name', and 'Phone Number'. A sidebar on the right of the Step 2 form contains links for 'MY DASHBOARD', 'ONLINE SERVICES', and 'MY PROFILE'. Another screenshot shows a 'Submit' button next to 'Enter Dealer Number' and 'Enter PIN' fields. The final screenshot at the bottom right shows a green checkmark and the message 'Relationship between User and Dealer was created' with an 'Ok' button.

https://dealers.sos.in.gov/ State of Indiana Indiana Dealer Licensing

AUTO DEALER SERVICES DIVISION ALL SERVICES IN.gov

IN Dealer: Your one-stop source for your license. LOGIN

IN.gov access INDIANA

Welcome to Indiana's single sign-in portal. Conduct business with ease and security.

Sign In

Email Address

Password [Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

Step 1

You must verify your Email Address first to create your Access Indiana Account.

1. Enter your email address and a code will be delivered. *** This may take work ***

2. Check your email in a new browser tab or window. *** Do not leave this work ***

3. After receiving the code, enter it and proceed to Step 2.

Email Address

Send verification code

Step 2

Create New Password

8-16 characters, containing 3 out of 4 of the following: Letters, Numbers, Symbols: @ # \$ % ^ & * _ + = [] { } | \ ; ' / ~ - () , .

New Password

Confirm New Password

Confirm New Password

First Name

Middle Initial

Last Name

Phone Number

MY DASHBOARD

ONLINE SERVICES

MY PROFILE

Enter Dealer Number:

Enter PIN:

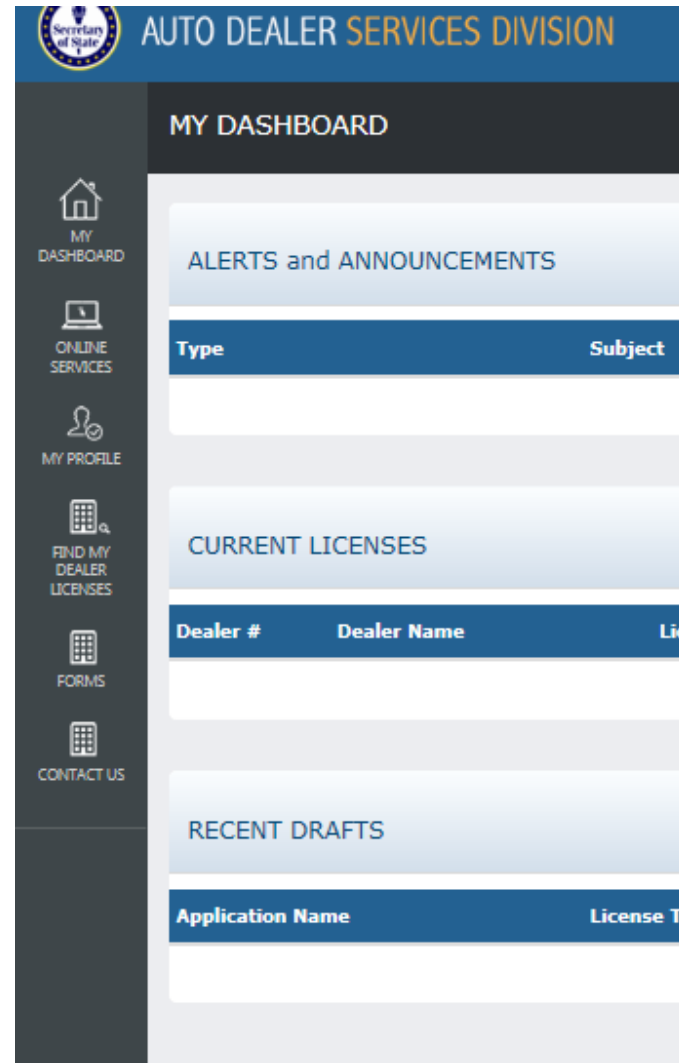
Submit

Relationship between User and Dealer was created

Ok

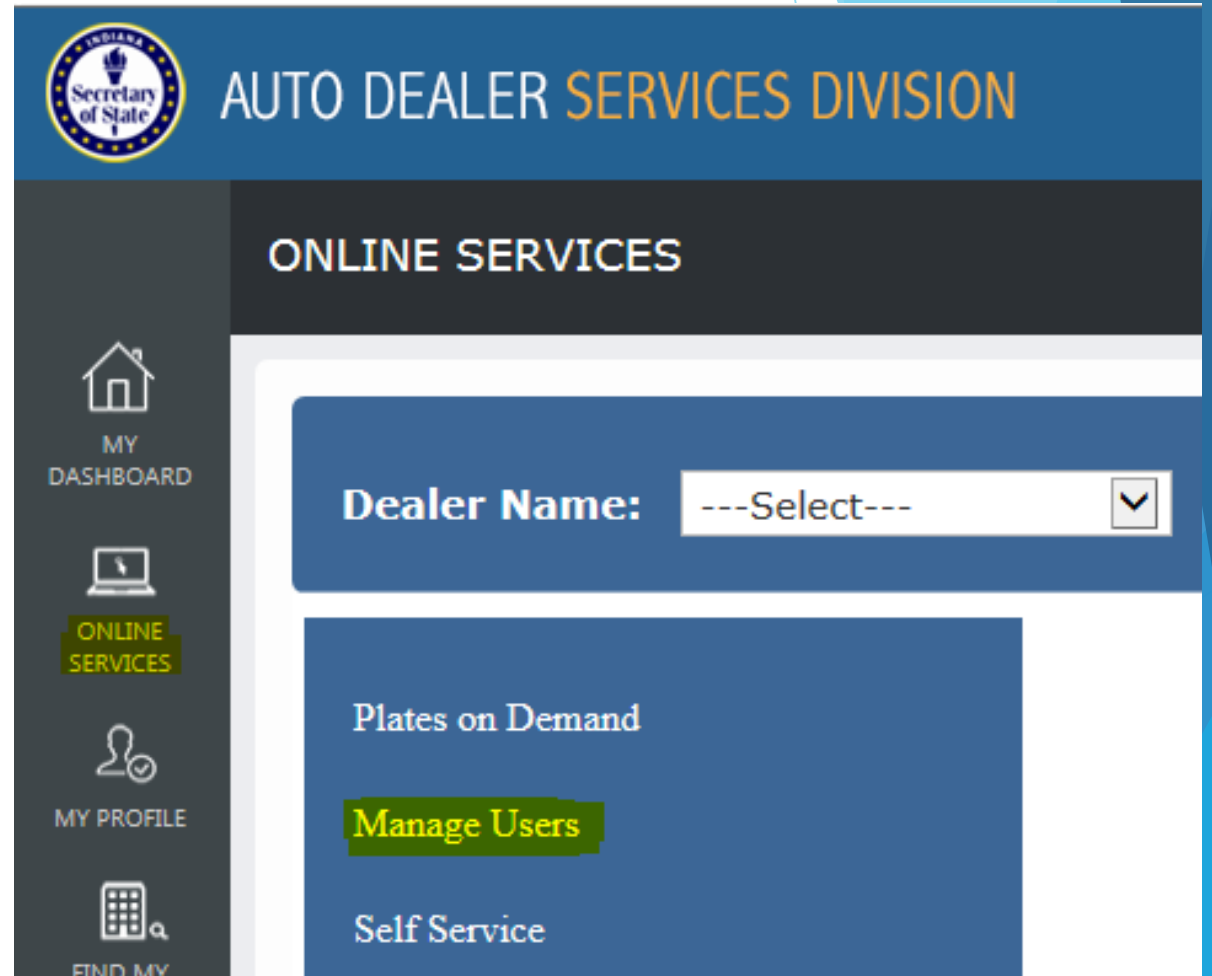
About the Online Dealer Portal

- Users can access options by clicking the tiles in the left Navigation Pane.
- NOTE: In Phase 1, only Plates on Demand and User Management will be implemented. Phase 2 will provide additional Online Services.



Manage Users

- Once staff has linked to the Dealer through the single sign-on and Find My Dealer Licenses process, the Primary User can then assign roles.
- Go to Online Services
- If linked to more than one Dealer, select the Dealer name from the drop down
- Select Manage Users



Manage Users: User Name(s)

- Those that have linked will appear in the User Management section.
- If only one name is present it is of the Primary User
- There may be multiple User Names listed, depending on the number of employees that have successfully linked
- Select the Edit icon.

User Management

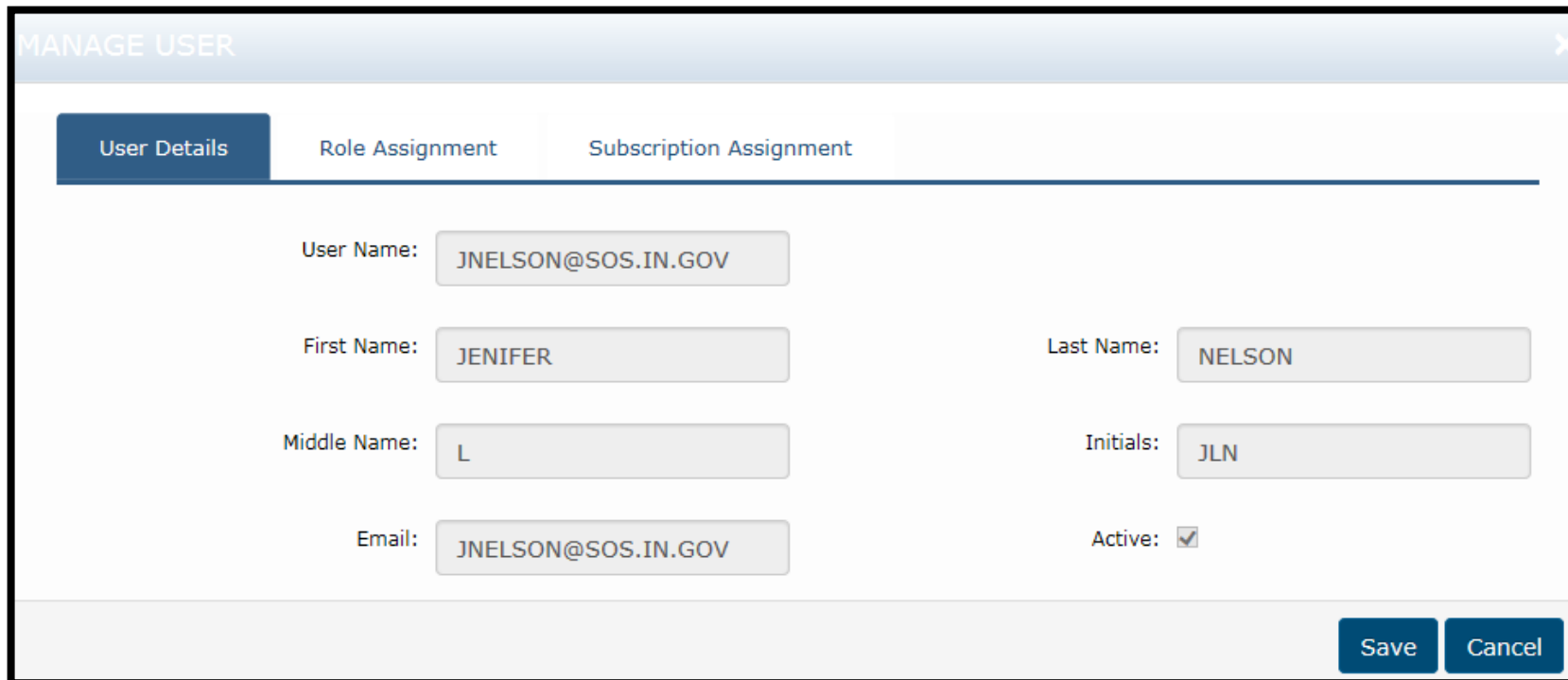
Dealer #: 1001416

Dealer Name: 260 MOTORSPORTS

User Name	First Name	Last Name	Linked	Edit
JNELSON@SOS.IN.GOV	JENIFER	NELSON	<input checked="" type="checkbox"/>	

Manage Users: User Details

- After selecting edit, the Manage User popup will appear
- Note: It is on this screen that you can remove the Active checkmark to remove access, when needed
- Select the Role Assignment tab




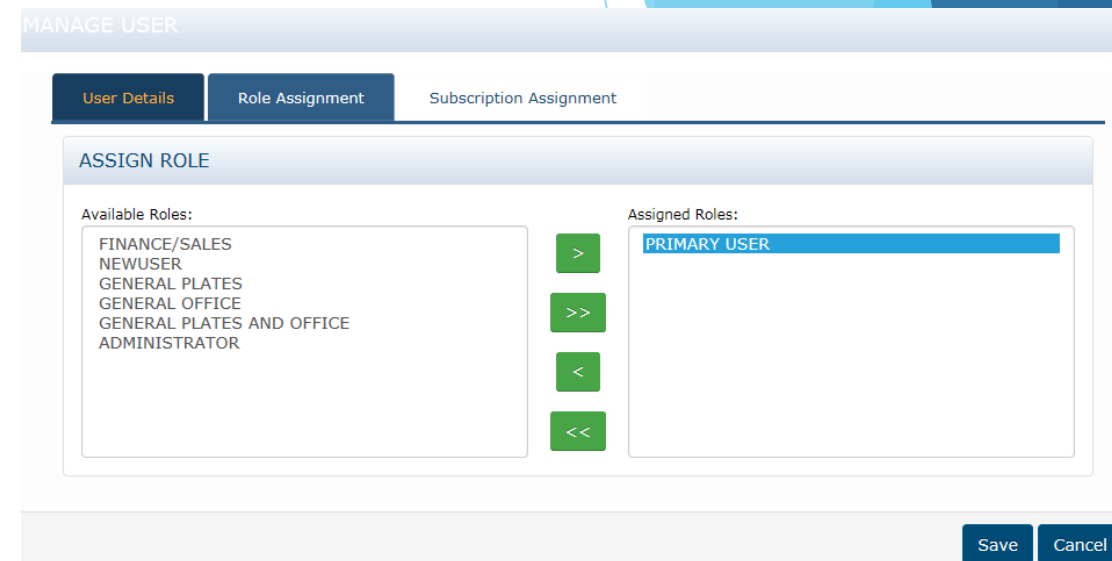
The screenshot displays a 'MANAGE USER' popup window with a title bar and a close button. It features three tabs: 'User Details' (selected), 'Role Assignment', and 'Subscription Assignment'. The 'User Details' tab contains the following fields:

- User Name: JNELSON@SOS.IN.GOV
- First Name: JENIFER
- Middle Name: L
- Email: JNELSON@SOS.IN.GOV
- Last Name: NELSON
- Initials: JLN
- Active: ☒

At the bottom right, there are 'Save' and 'Cancel' buttons.

Manage Users: Role Assignment

- The role granted the user will appear on the right hand column “Assigned Role”
- Employees that have linked will be assigned “New User”. This role has no access other than establishing the relationship with the Dealer
- To update the role from New User, select the appropriate role from the list on the “Available Roles” column
- Select this icon 
- The role will appear in Assigned Roles
- Select Save to get this message



MANAGE USER

User Details Role Assignment Subscription Assignment

ASSIGN ROLE

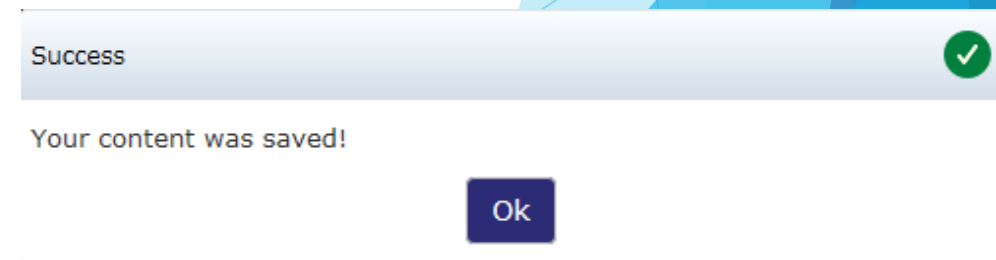
Available Roles:

- FINANCE/SALES
- NEWUSER
- GENERAL PLATES
- GENERAL OFFICE
- GENERAL PLATES AND OFFICE
- ADMINISTRATOR

Assigned Roles:


- PRIMARY USER

Save Cancel



Manage Users: Subscription Management

The ADSD will periodically send messages to Dealer dashboards. These will provide meaningful, relevant communication. To subscribe, follow these steps (similar to establishing the role):

- Go to Online Services, Manage Users
- Select Edit next to the user
- Select the Subscription Management tab
- Select the desired Subscription from the left hand column "Available Subscriptions"
- Select this icon 
- Select Save
- Receive the Success message

Additional Tools

Additional information is available on the Auto Dealer Services Division home page found here: www.in.gov/sos/dealer

Currently Available:

- Dealer Getting Started guide, and
- Explanation of User Roles Available in the New System
- FAQ




Coming Soon:

- IOT is publishing a guide on how to establish the Access Indiana single sign-on account. More details to follow



Instructions for Setting up Online Dealer Account

Letters containing PINs have been mailed to allow existing dealers to link to their account(s) online. Once the letter is received, follow these additional instructions for completing the process:

1. Dealer Getting Started : step by step process document assists users in linking to their account.
2. Explanation of User Roles Available in the New System : provides details regarding the available user roles.
3. Online Dealer Registration and Plates on Demand FAQ March 2017 : provides information regarding the Online Dealer Registration process and the Plates on Demand transition.

Step-by-Step Process Walkthrough

Now we will do a step-by-step demonstration of the process of establishing an account and granting users access.

If you have not already registered and would also like to perform the steps, please prepare the following:

- Have your Dealer PIN letter ready
- Have your desired email account ready
- Be logged in to your email service
- Go to this website: <https://dealers.sos.in.gov/>

Thank You for Attending

Thanks also to our technology partner,
GCR/PCC, for assisting with today's webinar

Indiana Secretary of State Auto Dealer Services Division	
Auto Dealer Services Main Line	317-234-7190
Fax	317-233-1915
E-mail	Dealers@sos.IN.gov

